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Annual Data Collection

Overview for Electronic and Paper Filers

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Annual Data Collection Overview for Electronic and Paper Filers

Introduction

The Annual Data Collection (ADC) packet accompanying this overview contains samples of the forms you will need to complete, as well as where to find instructions for getting started with our Internet Reporting and Information System, which we call IRIS. Also in the packet is your final personnel data from 2007-2008. Whether you choose to file electronically or continue with paper filing, you will be editing last year's personnel data.

Please take the time to review the information below. It contains a list of changes and additions to the ADC for 2007-2008, steps to take if you are filing electronically or on paper, and general instructions and definitions for filling out the forms.



- Many components of ADC have been moved to the AIM system. You will no longer report student data in ADC. This includes dropouts, completers, Limited English Proficient, Immigrant, Gifted Students, disaggregated enrollment and attendance.
- Indian Education for All questions have been modified from last year.
- Job Codes have been added and modified to reflect requirements for Highly Qualified teachers and paraprofessionals.
- The number for the telephone help line has been changed to 406-444-4050
- New passwords were mailed to the districts in June 2007. If you are doing data entry in September or October, remember to add SO to the end of the core password.

Options for Filing Your Reports

Most schools and districts will file electronically, logging on to the OPI IRIS system with a secure username and password. Passwords change annually, on July 1. We mailed out new passwords for 2007-2008 to the district authorized representative in June. School and district personnel who are unable to file electronically may print out the necessary forms from the OPI Annual Data Collection web page, fill out the forms by hand and mail them to the OPI by the listed deadlines.

If you choose to file electronically:

- Go to the OPI web site at <http://www.opi.mt.gov> and click on the tab marked IRIS (Internet Reporting Information Service).
- Login using the user name and password that were mailed to the district in June, 2007.
- If this is your first time to use the system, you will need to download the Citrix Client software before logging in. See Citrix login instructions available on the login page, or at <http://www.opi.mt.gov/ADC/index.html>.
- If you have not updated your Citrix software since June 1, 2007, you should update to the latest version by clicking on [update your Citrix client](#) and following the instructions. You

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will need to close and reopen your browser after the update and then log in using your current user name and password.

- Follow the numbered steps on the data entry menu to complete all forms for your type of entity. Refer to the ADC User Manual, available as a PDF at <http://www.opi.mt.gov/ADC/index.html> and also available on the IRIS login page.
- The district level and school level personnel data that you reported to us last year will be pre-filled on the data entry forms. Make the necessary changes according to the ADC User Manual.
- Preview and print a copy of each completed form by clicking on the Print Preview button at the top of each data entry screen, or select the Reports tab on the main menu to view and print each form. You will need to retain a copy of each form for your records.
- When you have completed all the data entry forms, click Submit on the data entry menu. The program will validate your data entry and notify you of any omissions prior to submittal. Once data entry is complete, you can do your final Submittal.
- A Preliminary Accreditation Report is generated once submittal is complete. Carefully review this report and report any changes to the OPI prior to the listed due date.
- If you need to make changes after you have submitted your data, you will need to contact the user at the next user level to make the changes for you. Schools would contact the district, districts would contact the county superintendent, and county superintendents and coops would contact the OPI.
- If you are a school doing your own data entry, mail your school calendar and master schedule along with a copy of each form to your district office.
 - Districts will review the data and forward the forms, calendars and master schedules along with a signed copy of the Authorized Signatures and Checklist form (one per district) to your county superintendent. Keep copies of the forms for your records.
 - County superintendents will review the data, sign the Authorized Signatures and Checklist form and forward the school calendars, master schedules and Authorized Signatures and Checklist to the OPI by the due date.
- If you are a district doing data entry for your schools, keep a copy of each completed form. Sign and mail the Authorized Signatures and Checklist, along with all the master schedules and school calendars, to the county superintendent.
- If you are a county superintendent doing data entry for your schools, keep a copy of each completed form. Sign and mail the Authorized Signatures and Checklist along with the master schedules and school calendars to the OPI by the due date.
- Submittal is not official until the OPI receives signed copies of the Authorized Signatures and Checklist page.

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If you choose to file on paper:

- Your ADC packet contains copies of your personnel data forms from last year. Refer to the enclosed instructions (page 11) to make the necessary changes to these forms.
- Go to <http://www.opi.mt.gov/ADC/index.html> and print out blank copies of the rest of the forms.
- Fill out each form following the instructions on the form and in this document. Use the Authorized Signatures and Checklist page to make sure you complete all required forms.
- Each school should keep copies of its own data forms and send a copy to the district office along with a school calendar and master schedule.
- Each district should send to the county superintendent: (Send each form even if the student count is zero.)
 - School calendar for each school in the district
 - Master schedule for each school in the district
 - Organization Setup form for each school in the district
 - PIR Days for each school in the district
 - Accreditation Data for each school in the district
 - District level personnel form (one per district)
 - School level personnel form(s) for each school in the district
 - Alternative Education Programs for each school in the district
 - Indian Education Report for each school in the district
 - Technology Use Report for each school in the district
 - Personnel Recruitment and Retention Report (one per district)
 - Distance Learning Report (one per district)
 - Testing Coordinators Report (one per district)
 - Completed Authorized Signatures and Checklist (enclosed in this packet)
 - Keep copies for your own files.
- Each county superintendent should review these forms, sign the Authorized Signature and Checklist page where indicated, and forward the packet to the OPI by the due date listed. Keep copies for your own files.
- Submittal is not official until the OPI receives a signed copy of the Authorized Signature and Checklist page along with a copy of each form listed on the checklist.

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Instructions and Definitions

Staff Assignments - Reporting Instructional Paraprofessional Staff

Please make sure that in reporting your personnel assignments, you distinguish between those Instructional Paraprofessionals that are paid with Title I monies and those that are not. In all cases, special education instructional paraprofessionals should be reported under the special education job codes (SE 25 or SE26 as appropriate). Special education instructional paraprofessionals, must meet the same qualifications as other paraprofessionals under the NCLB Act.

Instructional paraprofessionals will be reported on the School Level Personnel Form. If you are filing electronically, you may find some of your paraprofessionals are not in the personnel database. If they are not already on the list, you will need to add these people to this list before you can assign them job codes and FTE. See the software user manual for *Adding a New Person Not on the List*.

For more information on qualified paraprofessionals, please refer to the Title I paraprofessionals Guidance, available at: <http://www.ed.gov/offices/OESE/SASA/paraguidance.doc>

Staff Assignments - Reporting Special Education Personnel

Each school district and special education cooperative must report all personnel employed and/or contracted to provide special education and related services for students with disabilities. This includes both certified and licensed staff.

Special Education Cooperatives: Cooperatives will use job codes that specify “itinerant” for any employee or contracted individual whose job requires working with or serving children in more than one school district and requires travel. Refer to the list of special education job codes for cooperative personnel. Accuracy of itinerant personnel reported by a cooperative is important because that FTE total is used in the calculation for a cooperative’s travel entitlement.

School Districts: Report special education personnel in the same manner as all other personnel at the district and school levels. If an employee is not assigned to a specific school (example: speech-language pathologist who provides speech services to students who are homebound throughout the city and has no ties to one specific school) the school district must either prorate the employee's time by individual schools in which those students reside, or choose one school at which to report the employee.

School districts participating in a special education cooperative do not report personnel who are employed by the cooperative and provide services to the school district - those personnel are reported by the cooperative.

When reporting school psychologists, school counselors, school nurses, and school social workers the FTE count must reflect the time employed to work with all students (with and without disabilities) and the time employed to work with students with disabilities. The job codes

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should reflect this breakout (example: the time a school psychologist is employed to work with students with disabilities should be coded as SP23 [School Psychologist] and the time employed to work with students with disabilities should be coded as SP24 [School Psychologist, Special Education]).

NOTE: For personnel who are paid from more than one federal program, the FTE must be broken out as accurately as possible to reflect time spent in each program. An example would be a teacher whose salary is paid from special education and Title 1 – the FTE breakout should reflect the salary breakout.

Staff Assignments - Reporting AP Courses

The College Board Advanced Placement (AP) Program allows students to pursue college level studies while still in high school. Detailed course listings in the Job Assignment Codes match the AP course and exam titles. Schools that offer these rigorous and challenging classes should choose the correct job code from the Job Codes dropdown list.

The following forms are to be completed at the school level

Accreditation Data

Answer all questions regarding compliance with Accreditation Standards. Include explanations where necessary.

PIR Days and School Start and End Days

Definition of PIR day

A pupil instruction-related (PIR) day is a day of teacher activities devoted to improving the quality of instruction. Districts may receive funding for up to a total of seven (7) PIR days or a maximum of 42 hours. A minimum of three (3) days of professional development (six hours of contact time per day in no less than two-hour increments for a total of 18 hours) must be scheduled for all professional staff. PIR time must NOT include any time also counted as pupil instruction (PI) time. Professional development is defined in the Montana School Accreditation Standards (ARM 10.55.714 and ARM 10.65.101).

- You are not asked to list your vacation and early release days, only PIR days.
- Start and End days are the first and last days of pupil instruction (PI). Do not include teacher workdays that occur before pupils are in attendance in the fall or after pupils are finished for the summer.
- All PIR days can be classified in one of four categories. For each date you list, select one of the categories from the Activities Code box at the top of the page.
- If you will be conducting two types of activity in one day, list each activity and its hours separately.
- If you have specific questions about PIR days or what information to include on this form, call (406) 444-4050 and choose option 3.

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Alternative Education Programs

The purpose of this data collection is to identify which districts operate alternative education programs to serve at-risk students and gather identifying information about these programs. For OPI reporting purposes, an alternative education program is a "restructured" academic program to serve at-risk students and operated within an accredited public school. In past years, alternative education sites were included with off-site locations on the Accreditation Data form. This year they are collected as two separate counts. Do not include alternative education program information when answering questions about off-site locations on the Accreditation Data form.

Indian Education For All

This annual report will provide the Office of Public Instruction with information on school and district efforts to implement the requirements of MCA 20-1-501, Indian Education for All. The complete text of the law is included on the first page of the form. The OPI will use this information in planning for future staff development and technical assistance delivery options across the state.

Technology Use Report

This annual report will provide the Office of Public Instruction with information for Federal reporting requirements, and assist the OPI in planning for future staff development and technical assistance delivery options across the state.

Indicate how many computers in your school are primarily used by students and how many are primarily used by teachers. Of those, indicate how many have Internet access. We also want to know what types of Internet connections you have in your school. For each connection type you choose how many of your student and teacher computers have that type of connection. Do not include computers that are strictly used by office or administrative staff in these counts. Contact your district technology leader or your local Internet Service Provider, or review your phone bill for details about connection type and speed.

The following forms are to be completed at the district level

Personnel Recruitment and Retention Report

The information will help identify shortage areas and provide support data for efforts undertaken to address those shortages.

We want to know how many openings in each subject, support or administrative area existed for the 2007-2008 hiring cycle. Of those openings, indicate how many were created by retirement. Then tell us how difficult it was to fill those openings.

We are also collecting information about the factors that influence people to leave positions. The dropdowns list factors in three categories. For each factor, rate the degree of influence it had on people leaving positions in your district.

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Distance Learning Report

This annual report will provide the Office of Public Instruction with the necessary information regarding district implementation of 10.55.907 ARM – distance, online, and technology-delivered learning – revised March 2004.

If you are a provider of distance learning, you will report which schools you are providing to as well as the names of the courses, the instructors' folio ids, and the grade levels being served.

If you are receiving distance learning, you will report the names of your providers, the courses being taught and the number and grade levels of students being served.

School districts may receive distance learning to supplement instruction as they would other supplementary resources without restriction.

Testing Coordinators

The district test coordinator is the person responsible for the successful communication, coordination, materials distribution/return, training, and administration of statewide testing. At this time, statewide tests include the Criterion-Referenced Test (CRT) and CRT-Alternate in Reading and Math in grades 3-8 and 10 and in Science in grades 4, 8, and 10 and the English Language Proficiency Test (ELP) in grades K-12. This form will be pre-filled with the test coordinator information we currently have on file. You should make any necessary corrections and adjustments. When the information is correct, check the box confirming you have reviewed the entry.

This information will be collected with the Annual Data Collection each October. Notify Judy Snow at jsnow@opi.mt.gov of any changes that occur between October and the spring testing window.

Preliminary Accreditation Report

The software automatically generates your Preliminary Accreditation letter once your data has been submitted. For schools filing electronically, district superintendents will need to print out and review that report. Based upon that review, districts need to notify OPI of any changes or corrections. If you do not respond by the due date listed on the report, the data will be presented to the Board of Public Education. The OPI will not be mailing preliminary accreditation letters to electronic filers. Letters will be sent to paper filers as they have been in the past.

Thank you for taking the time to read this overview. Please let us know if you have any questions. You can contact the Office of Public Instruction at (406) 444-4050

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District and School Level Personnel forms

- We encourage all schools, districts and cooperatives to complete their Annual Data Collection (ADC) electronically, using the IRIS tab on the OPI web page. If your school is not able to file electronically, you will need to go to the Annual Data Collection web page at <http://www.opi.mt.gov/ADC/index.html> to print out blank copies of the ADC forms which you can fill in and mail as you have done in the past.

Annual Data Collection Manuals:

- Annual Data Collection Overview for Electronic & Paper Filers
- ADC Software User Manual for Electronic Filers

These Forms are REQUIRED for those who choose to file by paper:

Form Name	Who is required to complete?	Description
Coop Authorized Signature and Checklist - coming soon	SE Coop	Authorized signature and checklist to confirm complete submittal
Special Education Coop - Personnel	SE Coop	Assignment of special education cooperative personnel
Organization Setup	School	Reporting of pupil instruction time

- Hint for printing documents in PDF format: Open the PDF and choose the Print icon from the tool bar. Check the 'Print as image' box located below the Properties button.
- Be sure to write the county, school name and school code (SC) at the top of each form that you print out and send to the OPI. For the District Personnel form, include the county, district name and legal entity (LE) number.
- Please complete all forms and reflect information as of the first Monday in October.
- Please check all preprinted information for accuracy. Using RED INK ONLY, cross out preprinted information for persons no longer employed or assignments that have changed and HANDWRITE CHANGES. Blank copies of the District level and School level personnel forms can be printed from the web site for entering new employees.
- Full-time equivalent (FTE) refers to the number of hours of work normally required in a full-time position. Please do not use fractions (i.e., 1/3). The total FTE for one person CANNOT EXCEED 1.000. For example, a full-time 4th grade teacher is 1.000 FTE, as noted on the school level personnel report. Another example: a person serves as a half-time (.500) FTE curriculum coordinator, as reported on the district level personnel report, and is a half-time (.500) FTE principal, as reported on the school level personnel report.
- An FTE unit is a portion of a full-time position dedicated to a specific job assignment. The FTE unit values are based on the number of FTE unit minutes per day (i.e., 45

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minutes for period one) divided by the total instructional minutes per day. Give each of your periods and FTE units a name and a decimal equivalent. See the attached worksheet for instructions and examples.

- **District Level Administrative Personnel:** One form submitted per district. Districts with district level personnel (i.e., superintendents, curriculum coordinators, etc.) must use only the job assignment codes listed as District Level Job Assignment Codes. Report **ONLY** the district level administrative job assignment's FTE or portion of FTE on the District Level Administrative Report. If district level administrators also have specialized or teaching assignments, those FTE portions must be reported on the appropriate report.
- **School Level Specialized, Teaching, and Paraprofessional Personnel:** Each school must submit this form indicating the school level assignments for each individual. Use **ONLY** job assignment codes listed as school level job assignment codes. This form lists all certified school level specialized and teaching personnel for a school. You will also include all school level instructional and special education paraprofessional staff on this form.
- If a person is assigned to more than one school, prorate the FTE between schools and report **ONLY** the FTE portion (i.e., 0.500, 0.33) for each school. Teaching assignments (including preparation time, study halls and other) and department chair assignments should be indicated on this form. **DO NOT DUPLICATE** teaching assignments of teachers shared between schools. If a teacher is shared between schools, indicate preparation time on one school's report only. If a teacher has an assignment period (i.e., band), which includes students from multiple levels (i.e., 7-12), list this assignment period on one school's report only.
- **Abbreviations on forms:**
 - Job Code - from Job Assignment Code list
 - Job Description - from Job Assignment Code list
 - Course Description - course detail. For "Math" please list specific course, i.e., Algebra, Geometry
 - Grade Low/Grade High - Grade level(s) of class taught (i.e., 7, 1-2, 9-12)
 - Student Load - Number of students enrolled in class
- **All other forms:** See instructions on form and in previous section of this Overview.
- **Documentation for corrections to district and school level information** must be submitted to the Accreditation Division prior to November 17. Incomplete or inaccurate reports will be returned to the district for corrections.

Thank you for reviewing these instructions and completing the Annual Data Collection. You can contact the Office of Public Instruction at (406) 444-4050.

Worksheet for Naming Periods/FTE and Calculating FTE

For paper filers

Creating Period/FTE Names

If your FTE is for district, special education coop, administrative, specialized or elementary teaching staff, name the unit to match the calculated FTE. For example, for a half time teacher, name the unit **0.500 FTE**.

If your day is broken into periods, (middle schools, junior high and high schools) the name will have up to 3 parts:

1. The number of the period.
2. The days of the week the class meets. Write just the initial of the day; use R for Thursday. If classes meet on A or B days, write the letter. If a class meets every day, leave the second part of the name blank.
3. Session type and number: yearly, semester, trimester, quarter, other. If the class meets all year, leave the third part of the name blank.

Examples of Period/FTE Names:

P-1 = Period 1, meets every day of the week, all year.
P-1 MWF = Period 1, meets Mondays, Wednesdays and Fridays, all year.
P-1 Q1 = Period 1, meets every day of the week, quarter 1.
P-1 TR S1 = Period 1, meets Tuesdays and Thursdays, semester 1.
P-1 A T1 = Period 1, meets on A days, trimester 1
1.000 FTE = Full-time
0.750 FTE = Three-quarter time

Calculating FTE

FTE is calculated by dividing the number of instructional minutes for the particular time unit by the total number of instructional minutes. Instructional minutes do not include passing time, unstructured recess or lunch.

$$\frac{\boxed{} \text{ minutes per day } \boxed{} \text{ days per year}}{\boxed{} \text{ total minutes per day } \boxed{} \text{ total days per year}} = \text{calculated FTE}$$

Examples: In these examples, assume the school has 360 instructional minutes per day and has 180 days in the school calendar.

A part time 5th grade teacher teaches for 120 minutes per day all year.

$$\frac{120 \times 180}{360 \times 180} = 0.333$$

Period 4 meets 45 minutes per day for one semester (90 days).

$$\frac{45 \times 90}{360 \times 180} = 0.063$$

Period 7 meets 27 minutes per day, 3 days per week (108 days), all year.

$$\frac{27 \times 108}{360 \times 180} = 0.045$$